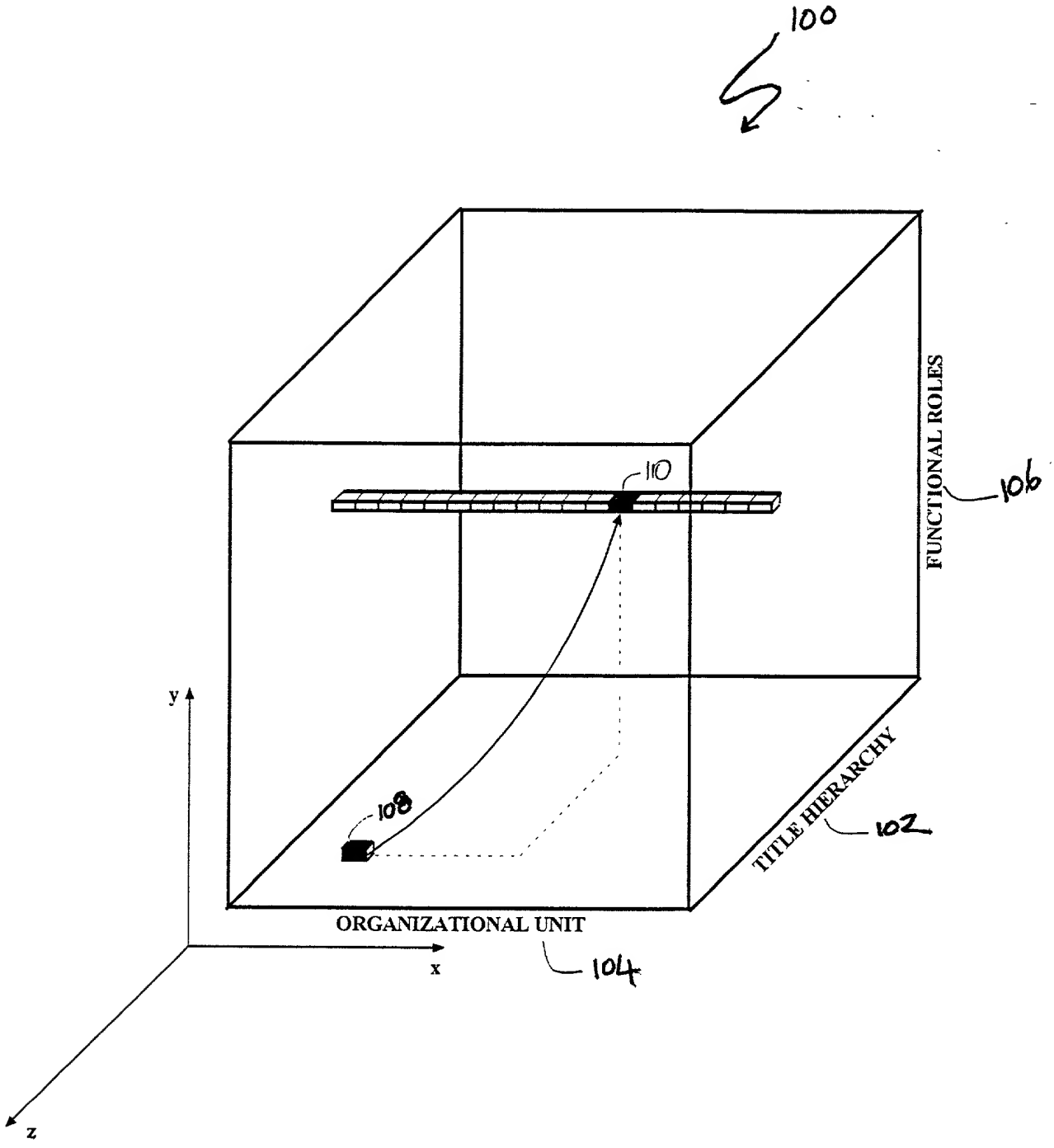

100
110
FUNCTIONAL ROLES
106
108
y
TITLE HIERARCHY
102
ORGANIZATIONAL UNIT
104
x
z

Figure 1

FR920030076US1

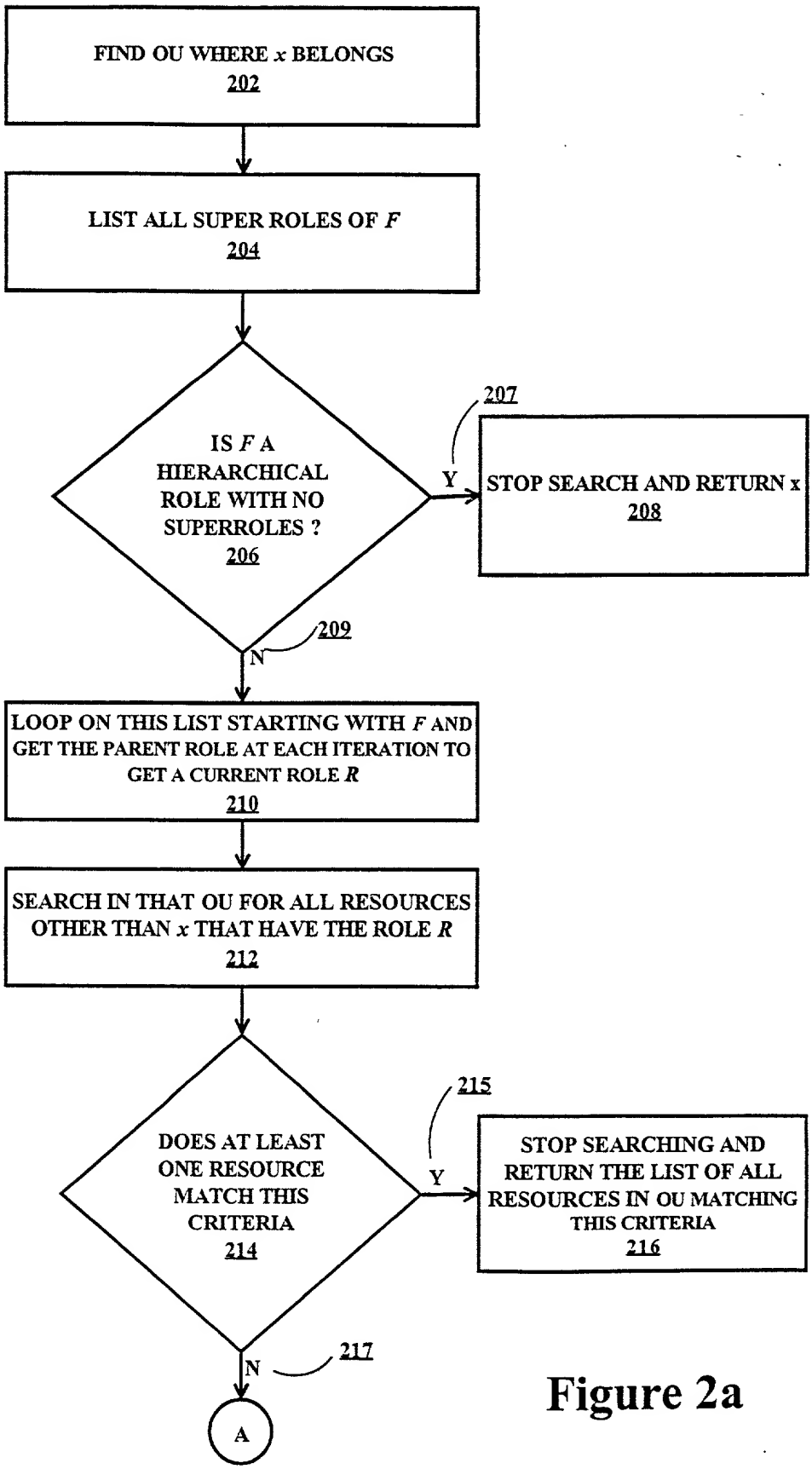



Figure 2a

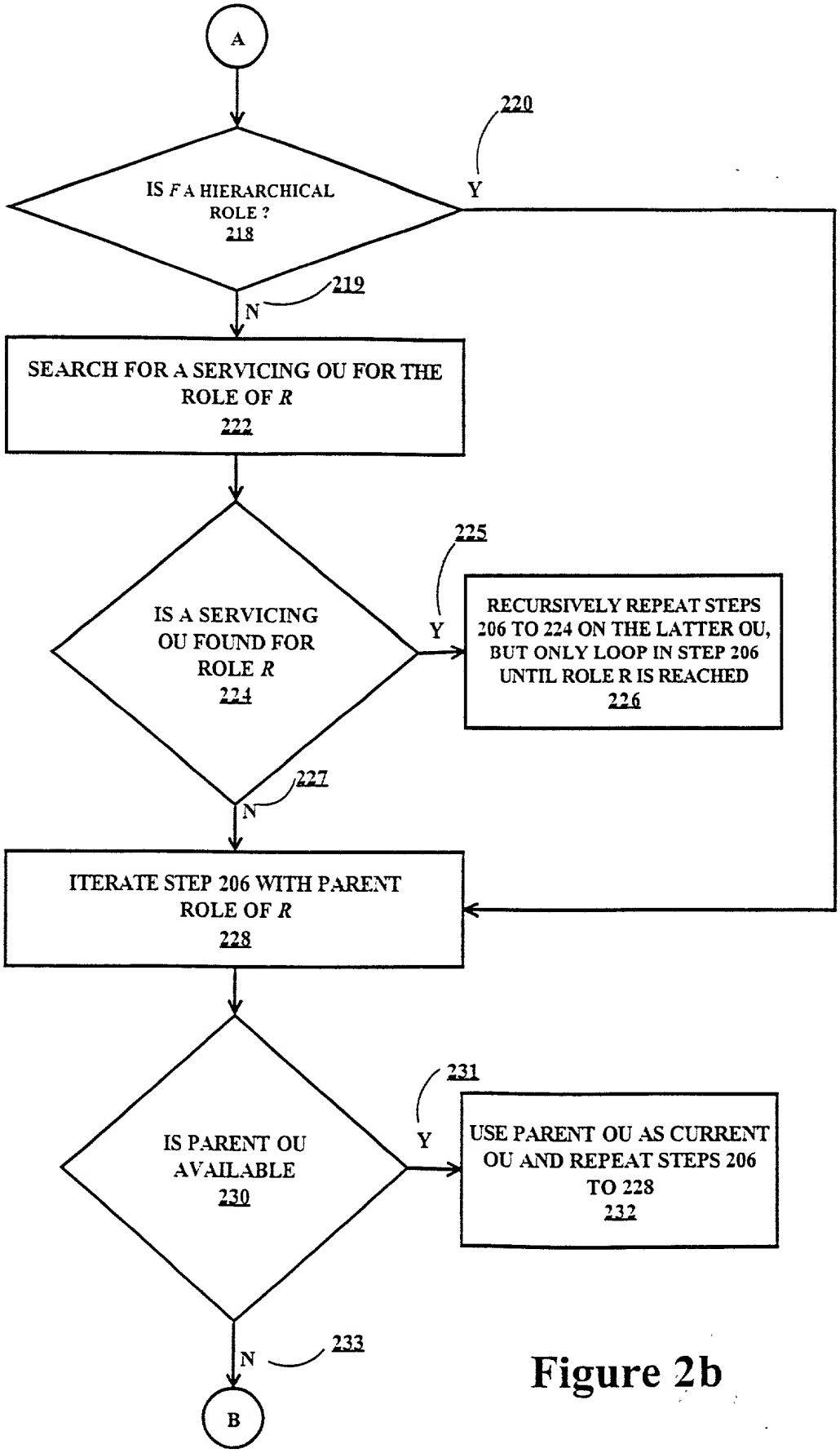

A
IS F A HIERARCHICAL ROLE ? 218
220
Y
N
219
SEARCH FOR A SERVICING OU FOR THE ROLE OF R 222
IS A SERVICING OU FOUND FOR ROLE R 224
225
Y
RECURSIVELY REPEAT STEPS 206 TO 224 ON THE LATTER OU, BUT ONLY LOOP IN STEP 206 UNTIL ROLE R IS REACHED 226
N
227
ITERATE STEP 206 WITH PARENT ROLE OF R 228
IS PARENT OU AVAILABLE 230
231
Y
USE PARENT OU AS CURRENT OU AND REPEAT STEPS 206 TO 228 232
N
233
B

Figure 2b

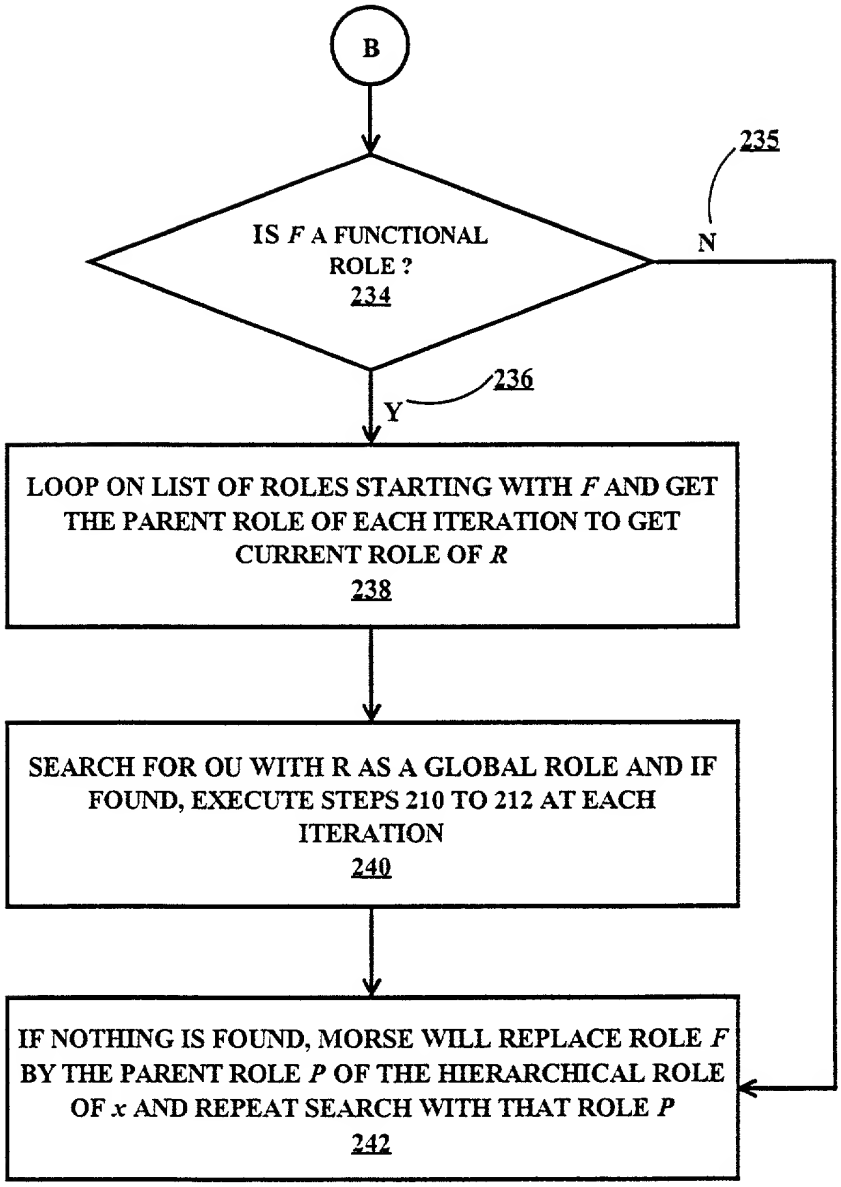

B
IS F A FUNCTIONAL ROLE ?
234
235
N
Y
236
LOOP ON LIST OF ROLES STARTING WITH F AND GET THE PARENT ROLE OF EACH ITERATION TO GET CURRENT ROLE OF R
238
SEARCH FOR OU WITH R AS A GLOBAL ROLE AND IF FOUND, EXECUTE STEPS 210 TO 212 AT EACH ITERATION
240
IF NOTHING IS FOUND, MORSE WILL REPLACE ROLE F BY THE PARENT ROLE P OF THE HIERARCHICAL ROLE OF x AND REPEAT SEARCH WITH THAT ROLE P
242

Figure 2c

TO6290"0T282860

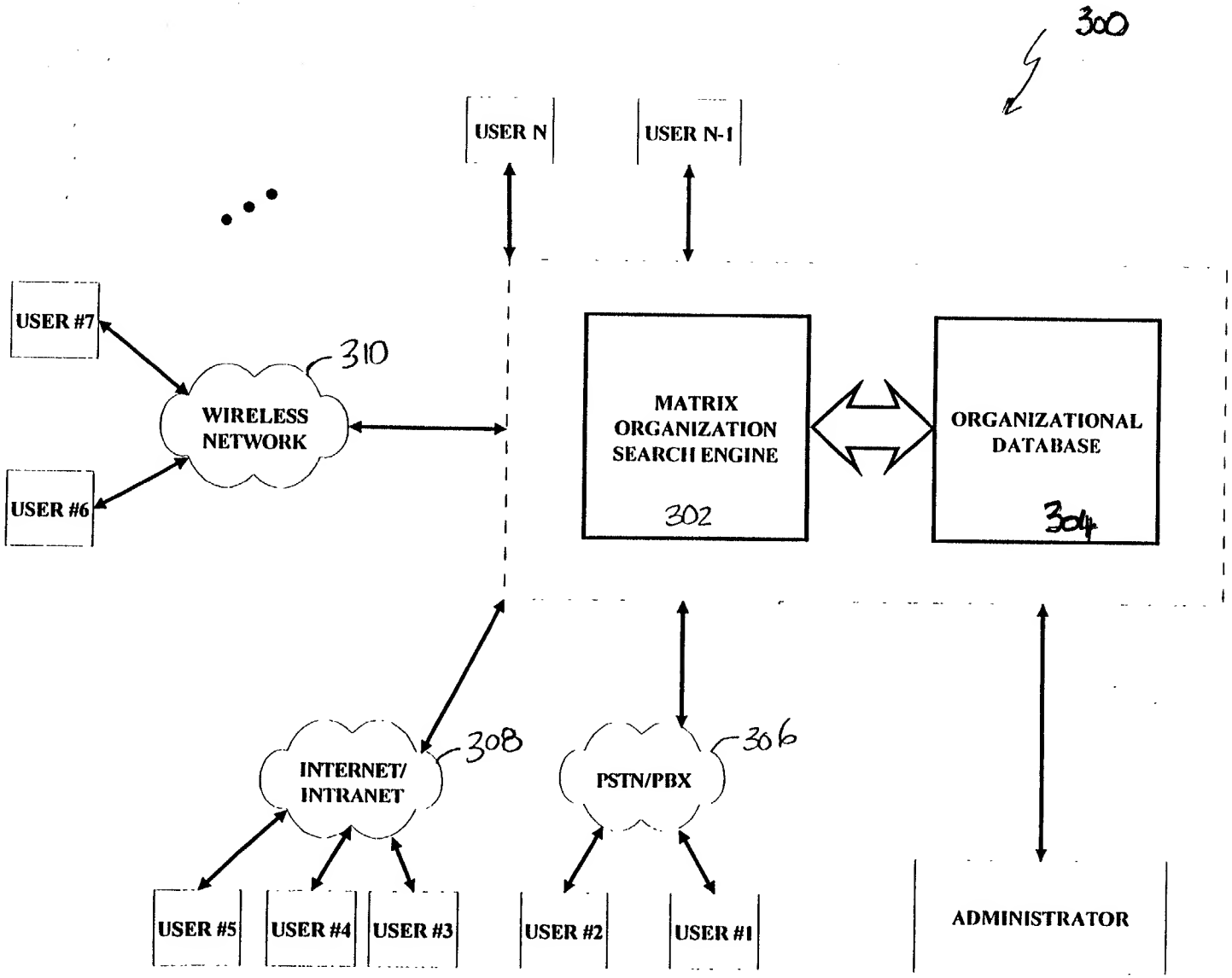



Figure 3

EP 1 062 590 B1 2007/28860

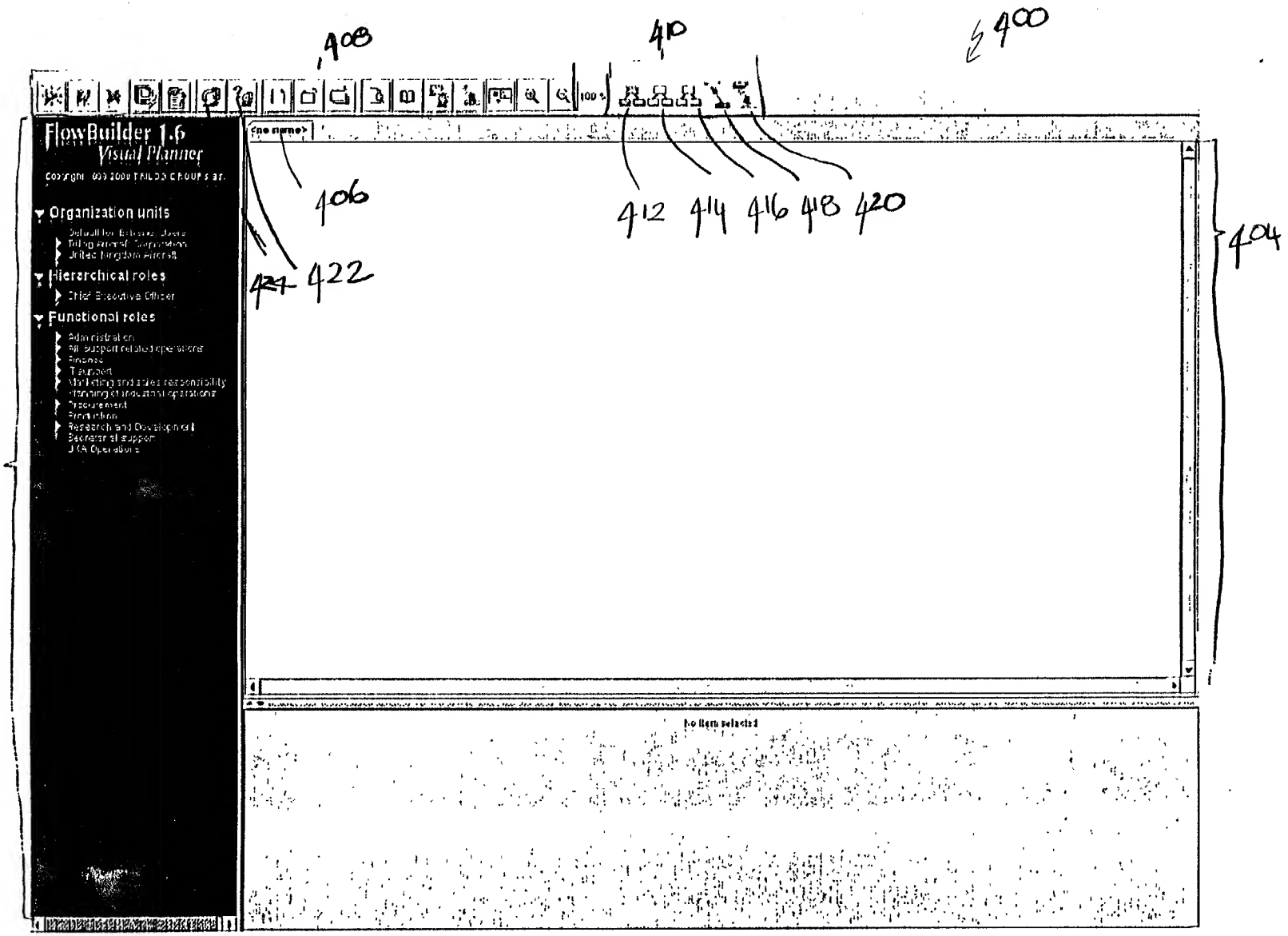



Figure 4

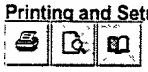
| BUTTON | FUNCTION |
|---|---|
| New Object | Creates a new object (from the same object type as that which is presently highlighted in the Object Store). For instance, if an organization unit object type were highlighted in the Object Store, this button would create a new, unnamed organization unit in the design area. |
| Edit | Edits the currently selected object. When selected, a dialog box opens, showing the attributes of the selected object. |
| Delete | Deletes the currently select ed object. |
| Save Changes | Commits all changes made to the organization definition. |
| Show Actions | Displays a list of all organization changes made since the last save. |
| Show People | Displays a listbox containing the names of all people who are defined in the organization, whether or not they've been assigned to organization units. |
| MORSE Search | Performs a "MORSE Search" to test role evaluation in your organization definition. It is not necessary to have an application design or even a workflow process to perform a MORSE test. Evaluation is based solely on the relationships defined in the Visual Planner (or Planner database, from the Notes client). |
| New View | Opens a new view in the design area. Views are tabbed and labeled according to the name of the parent object in the view. |
| Close View | Closes the current view in the design area. |
| Close All Views | Closes all open views in the design area.<br><br>*Neither of the two "Close" options will discard changes the user has made in an open view. Selecting the option to "Save" your changes will retain all changes made through the viewing panes, even if the user has subsequently closed the views.* |
| Printing and Setup  | These three buttons implement the standard printing functions – Print, Print Preview, and Page Setup. |
| Show/Hide People | Displays the list of all people who are assigned to each role, within either a functional role view, hierarchical role view or an organization unit view. |
| Show/Hide Functional Link | Displays the names of the functions that are provided, along functional links. For instance, if a red line exists between two organizations (indicating a functional link), clicking on this button will display the names of the functions shared between two organizations to be displayed. |
| Show/Hide Watcher | Displays a miniature view of the organization or role tree in the upper right corner of the design area. This functionality is most useful when viewing/creating a large tree in the design area that does not fit in the standard design window. From the Watcher, you can position your main viewing window to other parts of the tree, just by moving the view port within the Watcher. |
| Zoom | Zooms in or out on the view, in increments of 25% up or down. The present "zoom level" is displayed to the right of the zoom out button. |

Figure 5

| BUTTON | FUNCTION |
|---|---|
| **Organization Elements** | Adds organization elements to the active view with a simple drag-and-drop operation (clicking and holding, then dragging the object to the active view in the design area).<br><br>Placing the leftmost icon in the design area creates a new *organization unit/view*; placing the center icon in the design area creates a new *hierarchical role/view*; and, placing the rightmost icon in the design area creates a new *functional role/view*.<br><br>In any given view, only one type of item may be maintained. For instance, after you have created a new organization unit in the current view, the other two organization elements are inactivated for that view. |
| **Hierarchical Link** | Defines a hierarchical link between "child" and "parent" organization elements.<br><br>Hierarchical links are added by dragging the link object to the "child" and dropping (the organization element will change background color when a link is recognized), followed by clicking once on the "parent" element. |
| **Functional Link** | Defines functional links between organization units, and is therefore activated only while in an organization unit view.<br><br>Functional links are added with the same drag-and-drop operation as with the hierarchical link (above). The first item that you drop the link onto becomes the "serviced" or "client" organization, and the second organization unit, where the link is terminated, becomes the "servicing" organization. |

Figure 6

DS8S/10.0.0.0

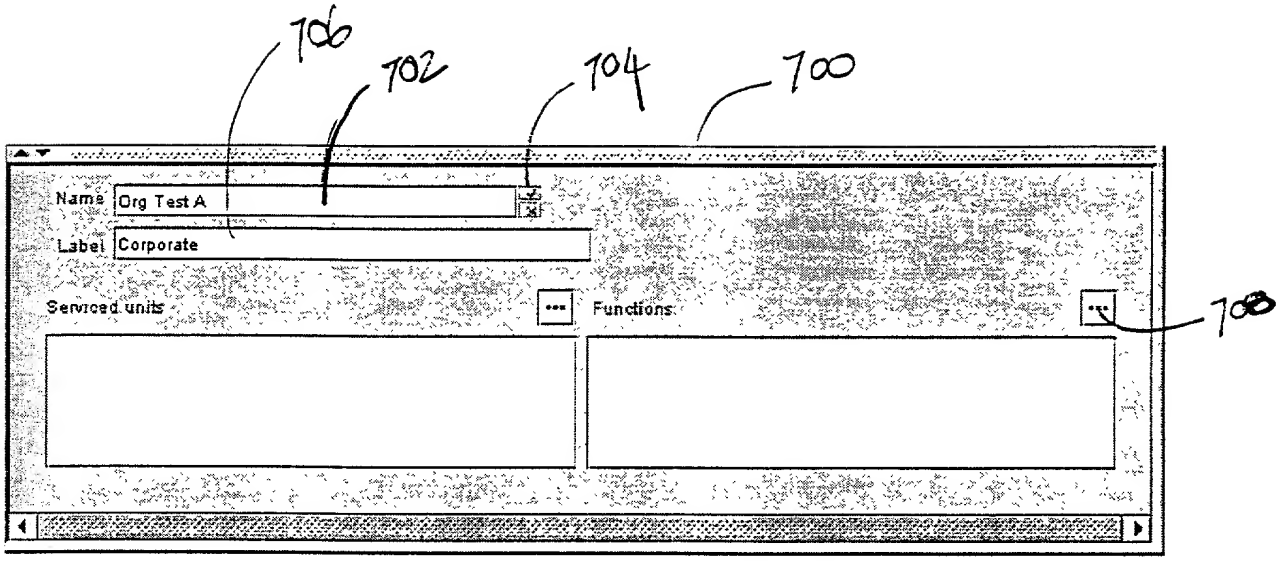

706
702
704
700
Name
Org Test A
Label
Corporate
Serviced units
Functions
708

Figure 7

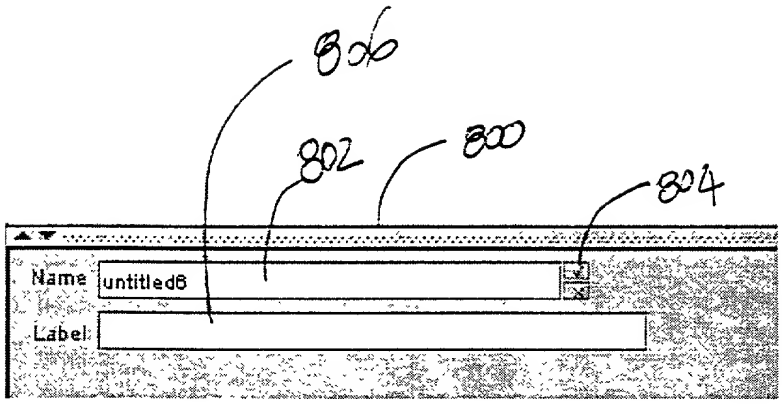



Figure 8

Docket No. 60035.0001US01

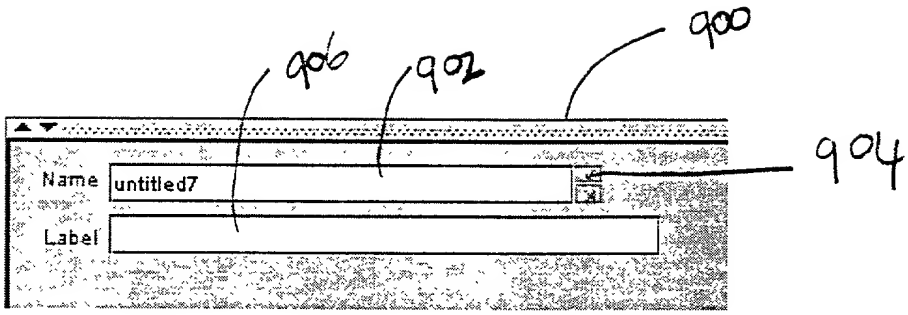



Figure 9

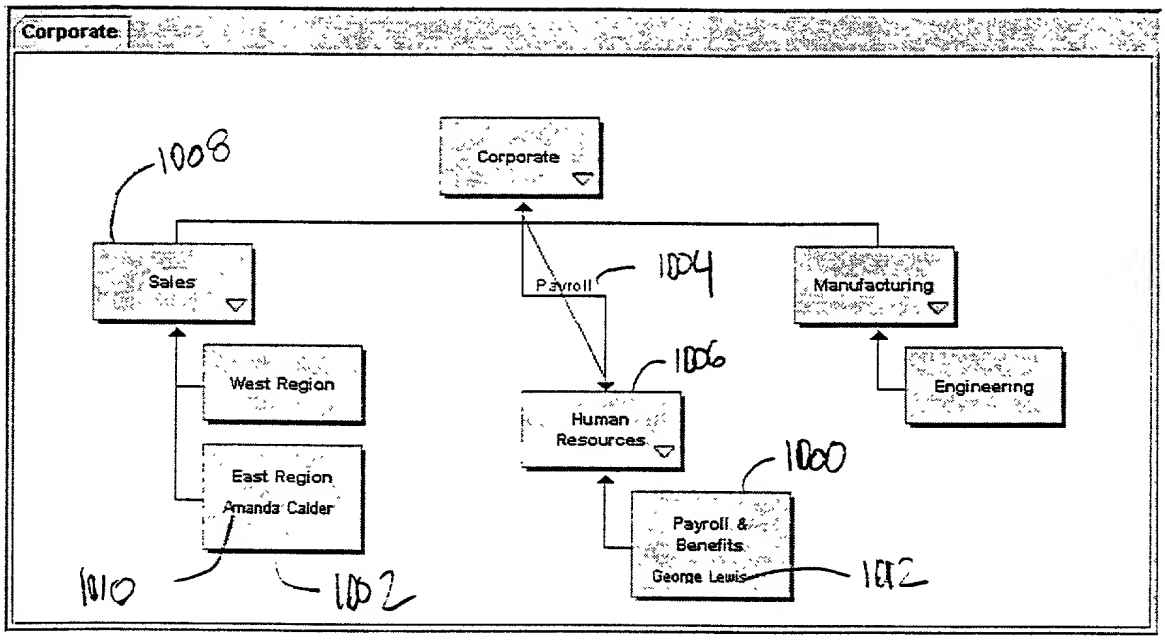

Corporate
1008
Corporate
Sales
Payroll
1004
Manufacturing
West Region
1006
Engineering
Human Resources
East Region
Amanda Calder
1000
Payroll & Benefits
George Lewis
1010
1002
1002

Figure 10

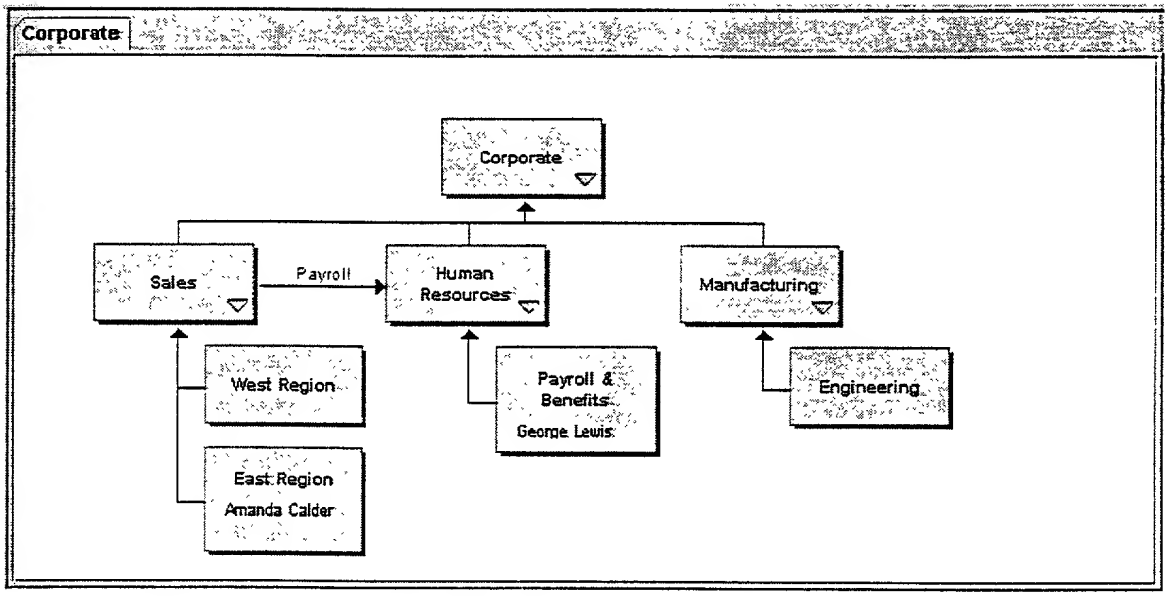

Corporate
Corporate
Sales
Payroll
Human Resources
Manufacturing
West Region
East Region
Amanda Calder
Payroll & Benefits
George Lewis
Engineering

FIGURE 11

SCANNED,# 10

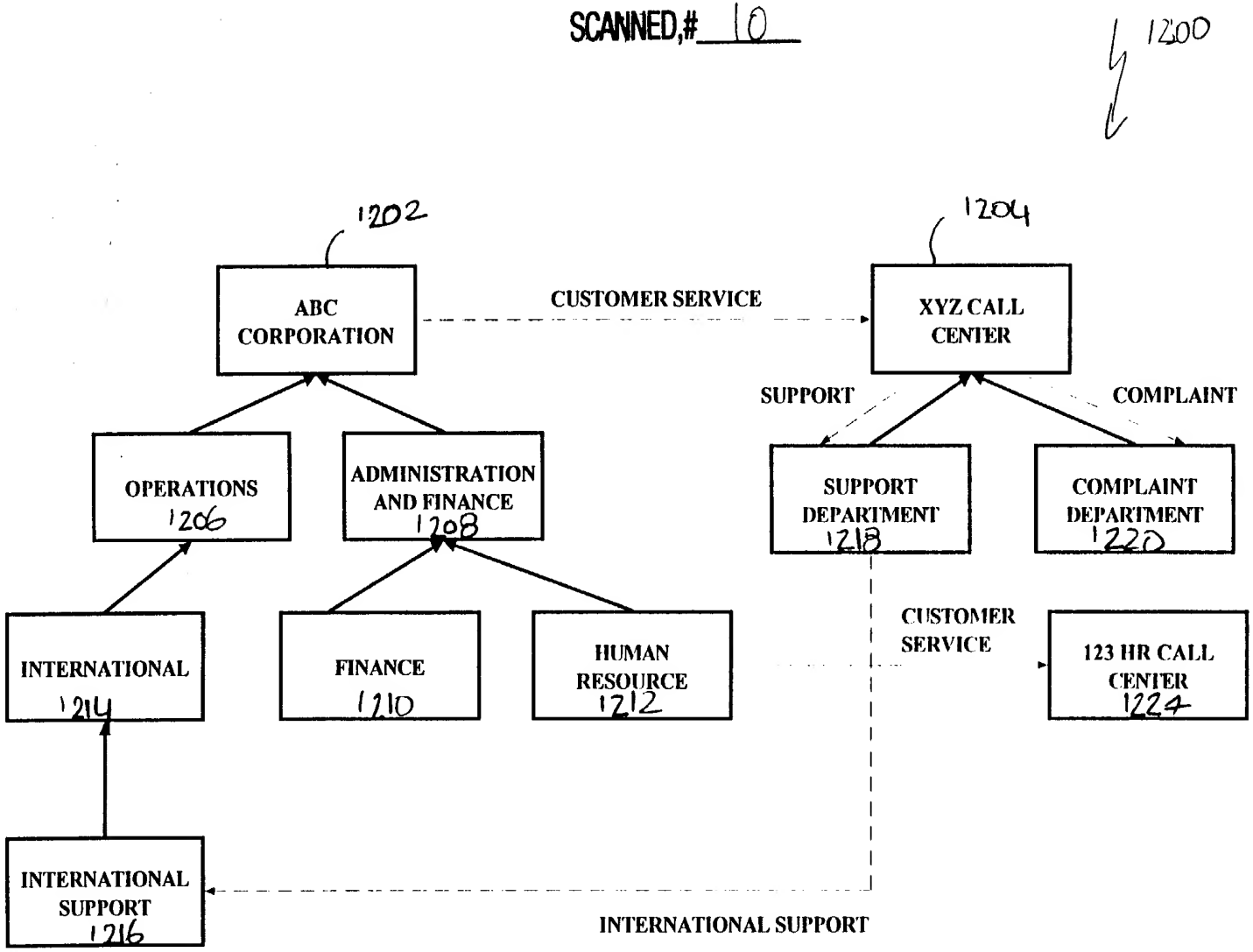



Figure 12

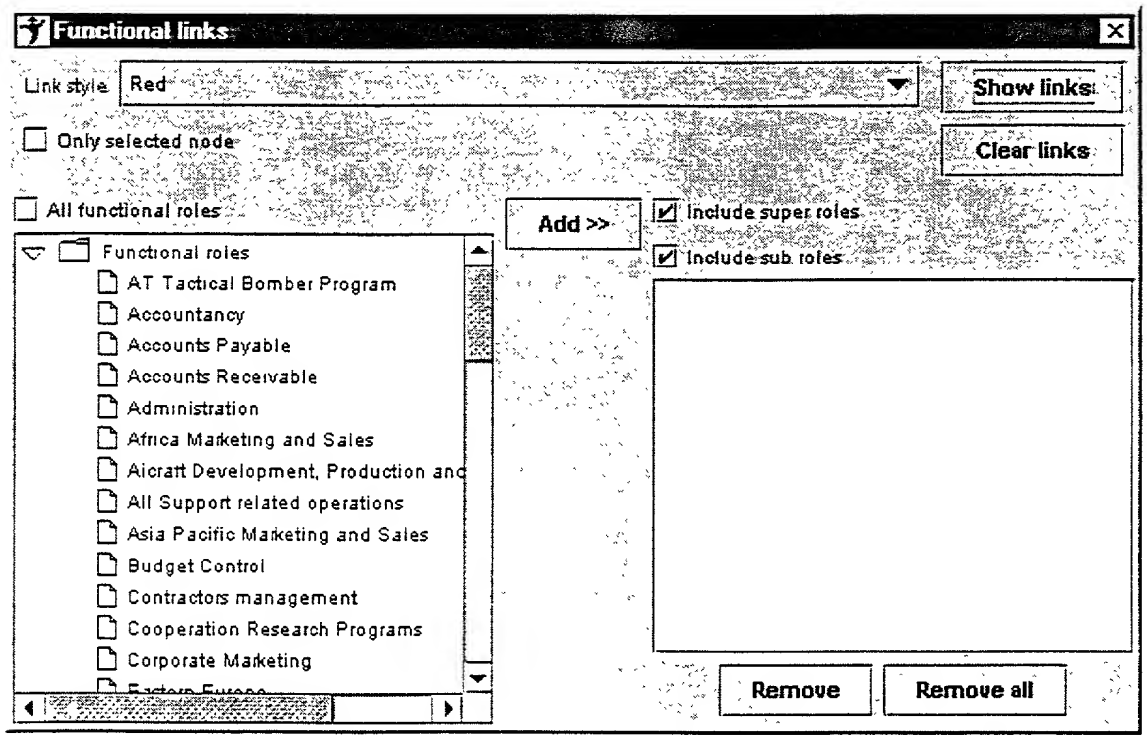

Functional links
Link style
Red
Show links
Only selected node
Clear links
All functional roles
Add >>
Include super roles
Include sub roles
Functional roles
AT Tactical Bomber Program
Accountancy
Accounts Payable
Accounts Receivable
Administration
Africa Marketing and Sales
Aircraft Development, Production and
All Support related operations
Asia Pacific Marketing and Sales
Budget Control
Contractors management
Cooperation Research Programs
Corporate Marketing
Remove
Remove all

Figure 13

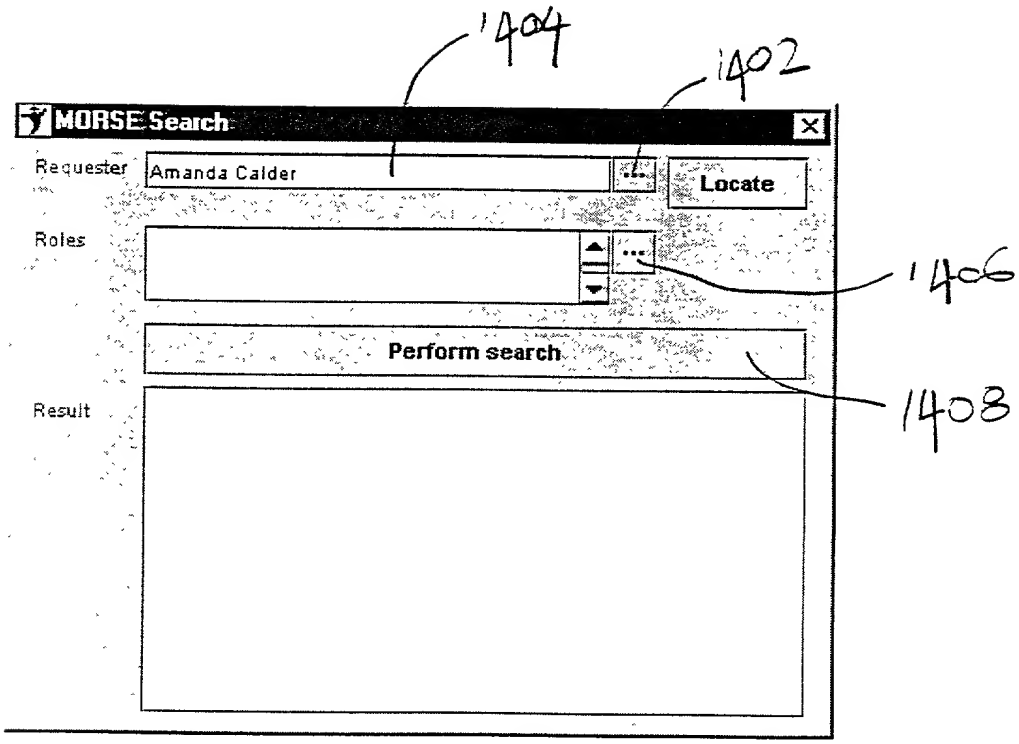

1404
1402
MORSE Search
Requester
Amanda Calder
Locate
Roles
1406
Perform search
1408
Result

Figure 14

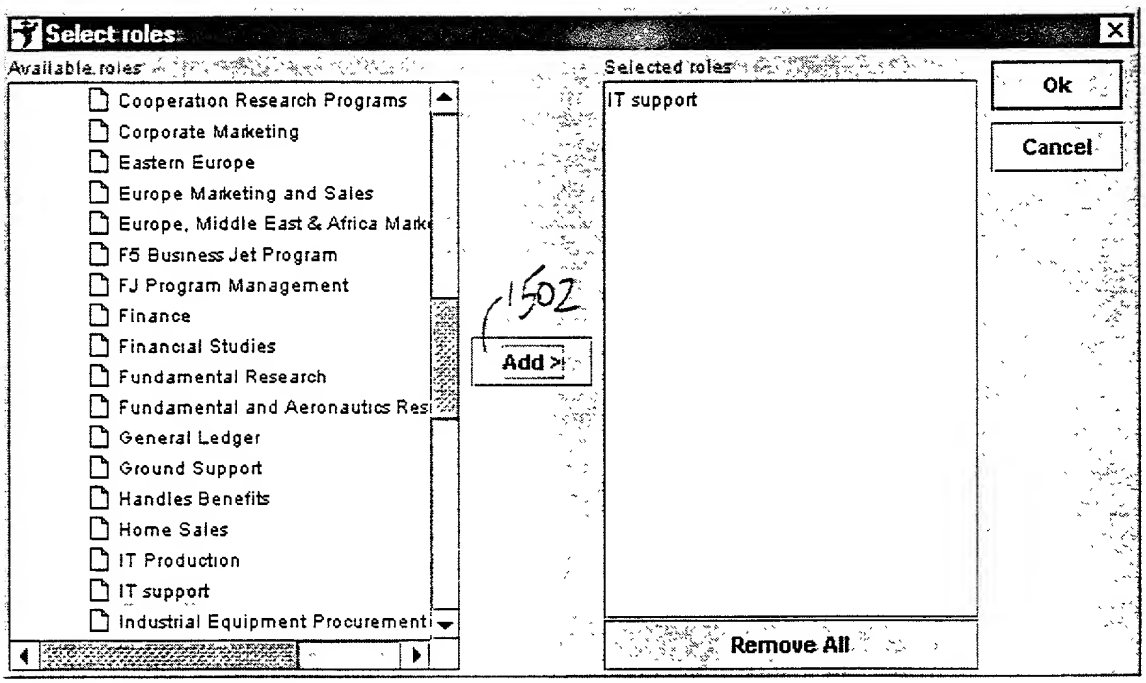

Select roles:
Available roles:
Cooperation Research Programs
Corporate Marketing
Eastern Europe
Europe Marketing and Sales
Europe, Middle East & Africa Marke
F5 Business Jet Program
FJ Program Management
Finance
Financial Studies
Fundamental Research
Fundamental and Aeronautics Res
General Ledger
Ground Support
Handles Benefits
Home Sales
IT Production
IT support
Industrial Equipment Procurement
1502
Add >
Selected roles:
IT support
Remove All
Ok
Cancel

Figure 15

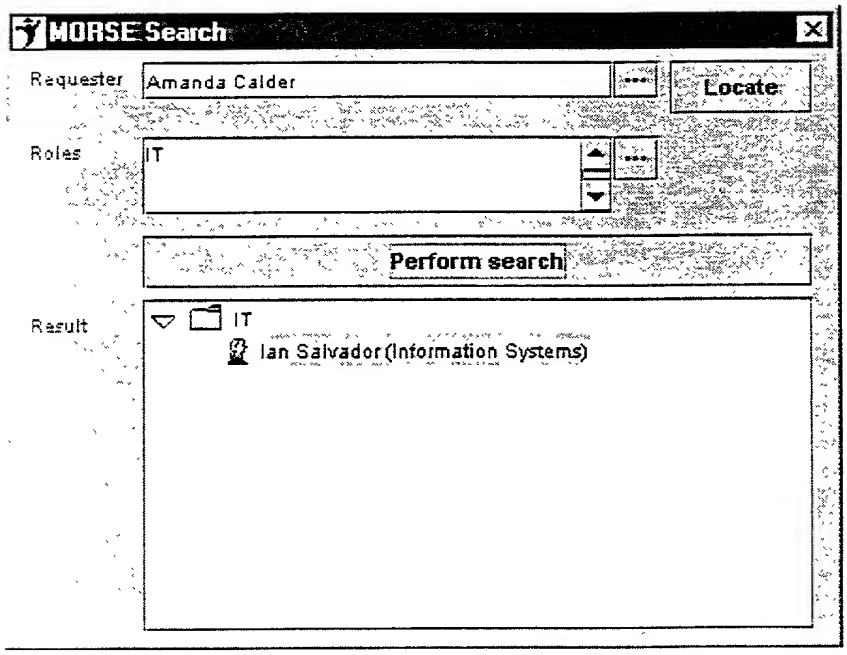

MORSE Search
Requester
Amanda Calder
Locate
Roles
IT
Perform search
Result
IT
Ian Salvador (Information Systems)

Figure 16

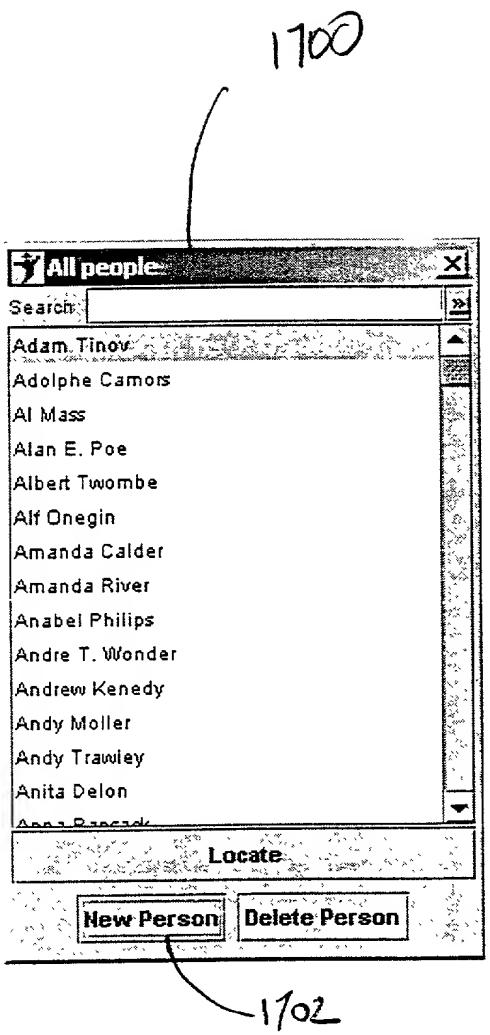

1700
All people
Search
Adam Tinov
Adolphe Camors
Al Mass
Alan E. Poe
Albert Twombe
Alf Onegin
Amanda Calder
Amanda River
Anabel Philips
Andre T. Wonder
Andrew Kenedy
Andy Moller
Andy Trawley
Anita Delon
Locate
New Person
Delete Person
1702

Figure 17

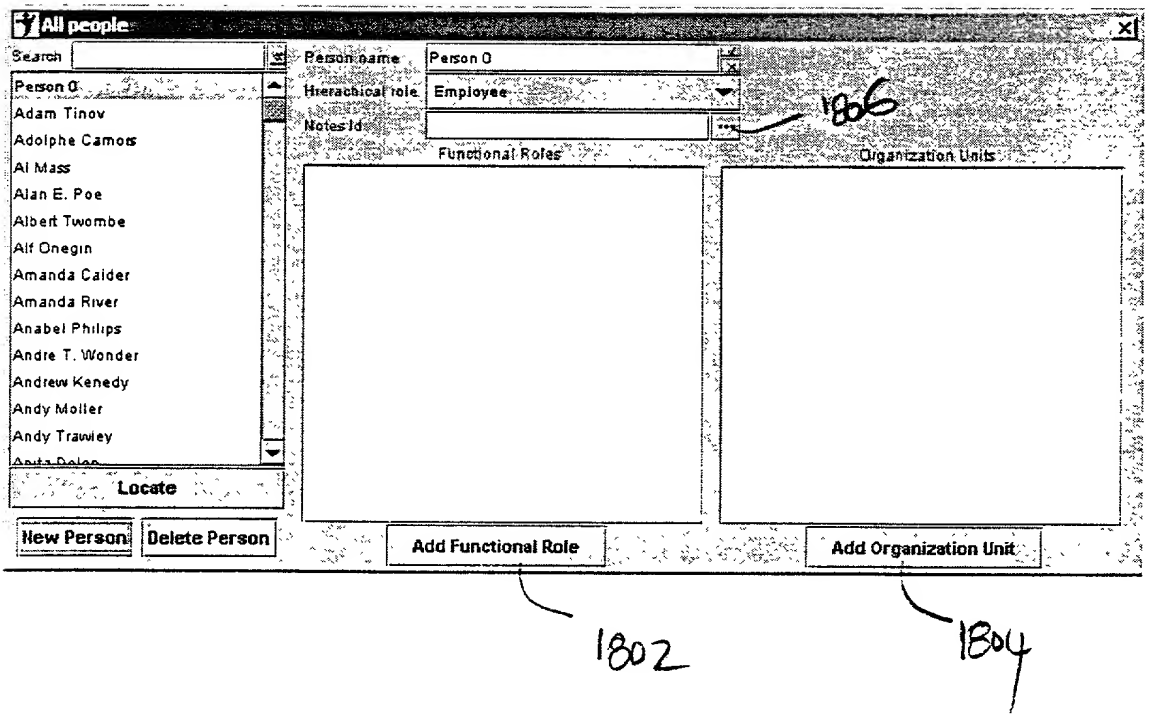

All people
Search
Person 0
Adam Tinov
Adolphe Camos
Al Mass
Alan E. Poe
Albert Twombe
Alf Onegin
Amanda Calder
Amanda River
Anabel Philips
Andre T. Wonder
Andrew Kenedy
Andy Moller
Andy Trawley
Locate
New Person
Delete Person
Person name
Person 0
Hierachical role
Employee
Notes Id
Functional Roles
Organization Units
Add Functional Role
Add Organization Unit
1806
1802
1804

Figure 18

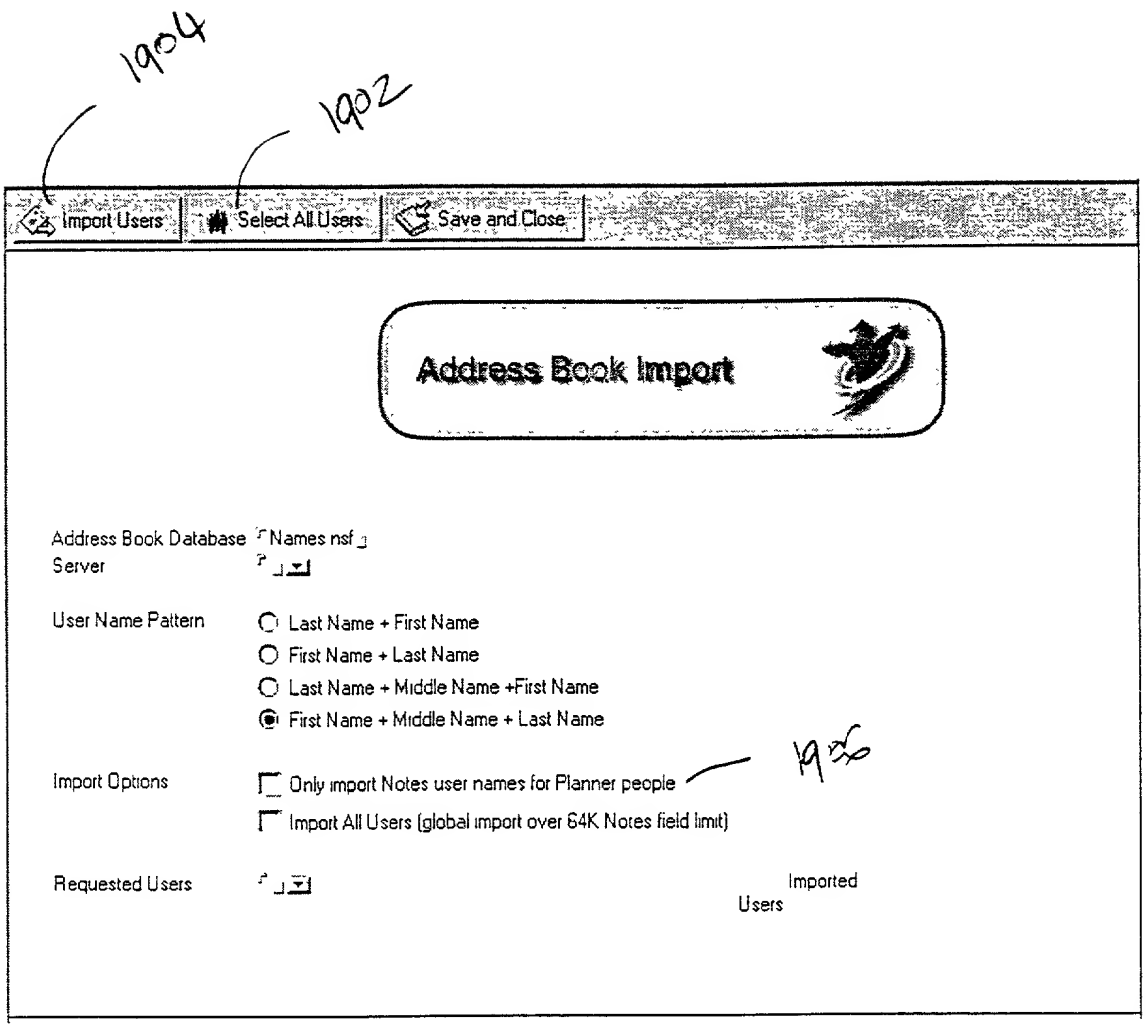

1904
1902
Import Users
Select All Users
Save and Close
Address Book Import
Address Book Database Server
Names.nsf
User Name Pattern
Last Name + First Name
First Name + Last Name
Last Name + Middle Name +First Name
First Name + Middle Name + Last Name
Import Options
Only import Notes user names for Planner people
1906
Import All Users (global import over 64K Notes field limit)
Requested Users
Imported Users

Figure 19

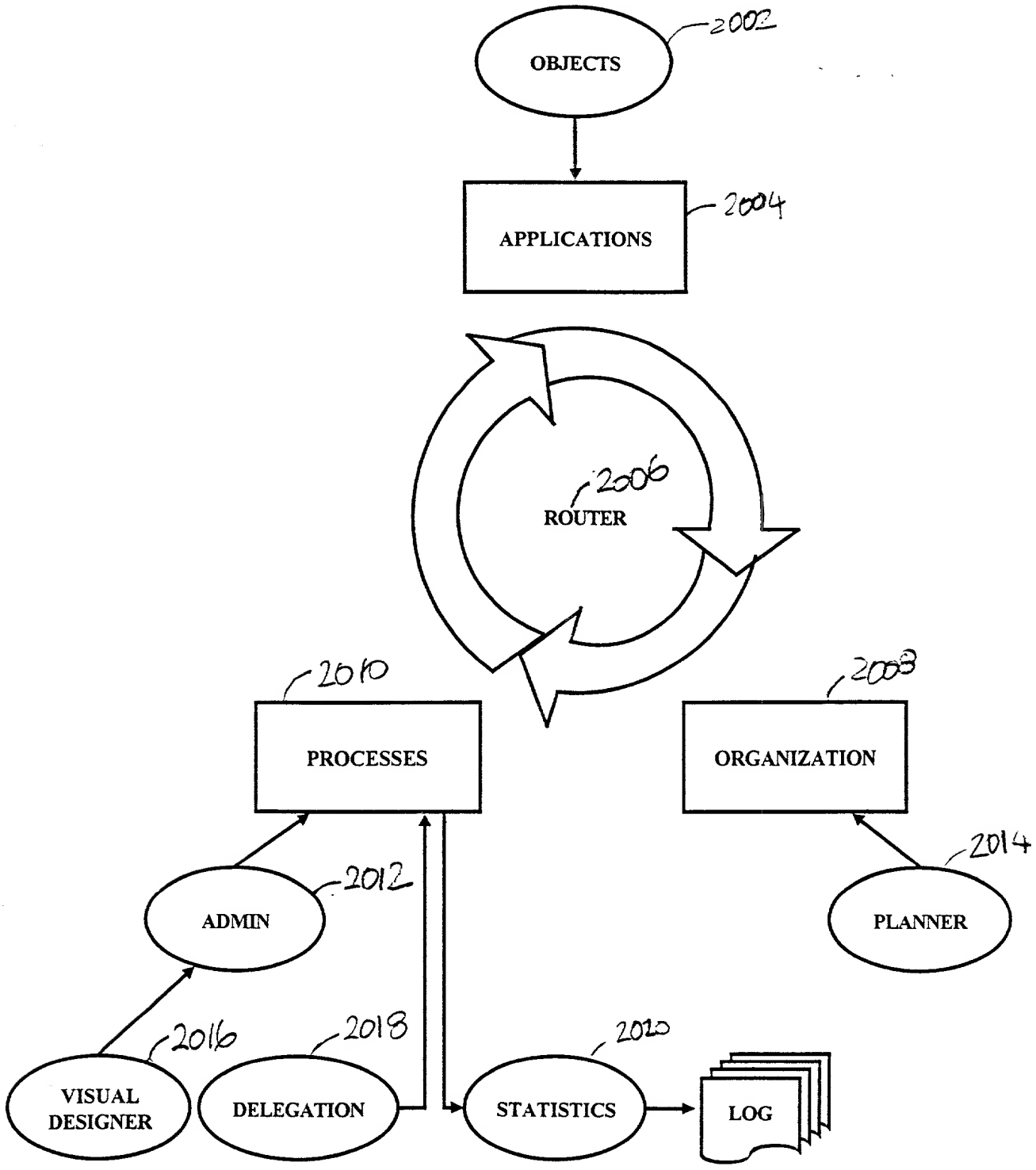

OBJECTS
2002
APPLICATIONS
2004
ROUTER
2006
PROCESSES
2010
ORGANIZATION
2008
ADMIN
2012
PLANNER
2014
VISUAL DESIGNER
2016
DELEGATION
2018
STATISTICS
2020
LOG

Figure 20